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ABSTRACT

This document is the facilitator's edition of a curriculum designed to be presented as a four-session workshop for customer service and credit department employees of a manufacturing company. It was developed by educators from the Emily Griffith Opportunity School. The workshop is designed around a basic communication model incorporating the three components of listening, discussing, and acting. It reviews communication skills that workshop participants may already have and offers strategies that may be used in more complicated situations. All of the materials and learning activities presented are applicable to both telephone and face-to-face communication and are designed to reinforce listening and conflict resolution skills. Each of the 4 workshop sessions included is designed to be competed in 2 hours. The primary objectives of the four sessions are as follows: identify communication difficulties and introduce the basic communication model; define and practice "active" listening techniques; identify and practice discussion/problem-solving strategies, including effective responses to criticism; and identify and practice techniques to conclude conversations, follow through on promised actions, and resolve conflict. Each section contains some or all of the following: objective, list of materials needed, detailed outline of procedures for facilitators to use in conducting activities, student handouts, and flipcharts. (MN)

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July 8, 1994

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Karen Fletcher

July 8, 1994

INTRODUCTION TO THE WORKPLACE LITERACY PROJECT

This module was developed by educators from Emily Griffith Opportunity School as part of a National Workplace Education grant funded by the U.S. Department of Education. A cooperative effort between the business and education communities, the program was designed specifically to enhance employees' literacy skills.

Direct benefits to the workforce include improved morale and motivation, self-esteem, team work, and promotional opportunities.

We gratefully acknowledge the assistance of our partners. In addition we recognize all of the students who participated in classes and who provided us with invaluable feedback for strengthening future classes.

We hope partnerships such as these will provide the catalyst for developing new or continued on-site educational opportunities.

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FOREWORD

This four-session workshop is designed around a basic three-part communication model - listening, discussing, and acting. It reviews communication skills participants may already have and offers strategies that may be used in more difficult or complicated situations. The material and practice are applicable to both telephone and face-to face communication.

This curriculum was designed for the customer service and credit department employees of a manufacturing company. The goal is to increase awareness and use of effective techniques to improve communications among employees and between employees and customers.

The main objectives are: to reinforce listening skills, to restate to insure understanding, and to resolve conflict when dealing with difficult customers or situations. These objectives were suggested by the customer service manager and needs assessments completed by employees of both departments.

Because most employees in these departments deal with customers over the telephone, telephone situations and strategies are stressed, but the aspects of face-to-face communications are also discussed. Situations suggested on the needs assessments and observed on the job were incorporated into the workshop as role-play examples.

The four sessions are each two hours long, allowing time for participants to read the material, discuss main points, share experiences, and practice the strategies using role-play. Session

One provides an introduction and overview of the workshop. The other sessions each focus on one part of the three-part communication model.

I suggested that the Customer Service Manager and/or team leaders do some form of follow-up in department or team meetings to use these strategies in group problem-solving.

Session 1 - Introduction/Overview

Materials Needed: Session 1 packets
Handouts 1-3 (H)
Flipcharts 1-3 (FC)
Markers

Activity	Facilitator's Notes
Handout 1 - Pre-Assessment	Distribute H-1 Pre-assessment and allow time for all participants to complete. Explain that we have a pre- and post-assessment to see how effective the materials and presentation are.
Handout 2 - Course Goals	Elicit additional goals from participants, write them on FC 1 and discuss. If possible, type goals and hand out at next session.
Read Session 1, pages 1 & 2	Discuss.
Flipchart 2	Elicit responses to questions on p. 2, record on FC-2 and discuss to clarify specific worksite situations.

Activity	Facilitator's Notes
Read page 3	Discuss definition of customer and statistics from "Where have all those long lost customers gone?"
Read page 4	Have participants read p. 4, then discuss 3-part communication model. Explain communication is a process involving "give and take" etc. and the importance of finding a win-win solution. Discuss customer's basic needs.
Read page 5	Discuss objectives for calls. Ask for other ideas from group.
Page 6 and Flipchart 3	Give participants time to write responses to questions on p. 6. Record on FC - 3. Discuss.
Handout 3 (Homework)	If time allows, ask participants to write a description of a frustrating communication situation with a co-worker or customer. If not, assign as homework to bring to Session 2.
Closing	Preview next session "Active Listening."

HANDOUT 1

PRE-ASSESSMENT

Answer the following communication questions. Some vocabulary may be unfamiliar. If you're unsure of an answer, skip it or put a ? in the answer space.

1. Give 2 examples that demonstrate you are listening "actively."

2. When you're speaking with someone, how does paraphrasing make your conversation more successful?

3. Which of the following statements do you think is more effective? (Circle the letter) Explain why.

   a. "You can't do it that way."

   b. "Can we think of a better way to do this?"

4. Describe a "win-win" situation.

5. Circle the letter of the statement you think would work best if you've decided to confront someone about a problem. Explain why.

   A. "I think we have a problem here."

   B. "I'm having trouble reading your writing on this order."

   C. "These things aren't done right."

HANDOUT 2

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COURSE GOALS

At the end of this workshop you will be able to:

- demonstrate listening skills by paraphrasing
- avoid becoming defensive in a conflict (coping with criticism)
- summarize expectations to conclude a conversation
- communicate with more confidence

HANDOUT 3

In the space below, write a description of a communication situation with a customer or co-worker that frustrated you. Don't mention names, but give as much detail as you can remember, i.e. what each person said, tone used, etc. We may use your example as a basis for a role-play.

FLIPCHART 1

ADDITIONAL COURSE GOALS

FLIPCHART 2

DIFFICULTIES	IMPROVEMENT RECOMMENDATIONS

FLIPCHART 3

HOW DOES BEING A GOOD COMMUNICATOR BENEFIT:

YOU	THE COMPANY	CUSTOMER

CUSTOMER SERVICE/ TELEPHONE COMMUNICATIONS

Session 1 - Introduction/Overview

****

OBJECTIVE: To identify communication difficulties and introduce the basic communication model

****

> Communication - a transmitting, giving and/or receiving information, signals, or messages by talk, gestures, writing, etc., or an exchange of thoughts, messages, information as by speech, signals, or writing.
>
> *Webster's New World Dictionary*

Saying what we mean is one of the hardest things to do and listening to what others say to find out what they mean is equally hard. Simple misunderstandings can lead to frustration or a "ruined day." At other times, a kind tone of voice can diffuse a tense situation because the person realizes that he/she is dealing with someone who cares about what he/she is saying.

Good communication leads to a mutually satisfactory agreement or a win-win situation. Achieving that involves listening, identifying the problem, negotiating, seeing things from the other person's point of view, patience, caring and a positive attitude.

In this workshop, we'll stress telephone communication since that's how you usually deal with your customers, although most of the strategies and

techniques apply to face-to-face communication with co-workers and families too! Being a good communicator takes practice. Through discussion and role-play, this course will help you use these skills to do your job better and feel better about it!

What things (situations) make communication difficult or frustrating for you at work?

_____

_____

_____

_____

_____

What can you or others do to make communications better?

_____

_____

_____

_____

_____

As customer service representatives, you are in a unique position. You have the dual responsibilities of representing the company positively and following its policies and procedures, while taking care of the many requests and questions of customers.

Our definition of customer will include two types:

external customers - those who choose to come to this company for a product

internal customers - co-workers, supervisors

*Note: This material will alternately use "he" or "she" when referring to customers, etc. rather than he/she, because it is easier to read and does not discriminate.

A Customer is not an interruption of our work, he is the purpose of it. We are not doing him a favor by serving him; he is doing us a favor by giving us the opportunity to do so.

A Customer is not an outsider to our business, he is part of it.

Author Unknown

Where have all those long lost customers gone?

1% of lost customers die
3% move away
4% just naturally float
5% change on a friend's recommendation
9% can buy it cheaper somewhere else
10% are chronic complainers
68% go elsewhere because the people they deal with are indifferent to their needs

From *The Essentials of Excellent Customer Service*, 1992 Skillpath Inc.

We'll be using a 3-part model for good communication.

LISTENING

1) letting the other person have his "say"
2) letting him know you care
3) letting him know you have heard what he has said

DISCUSSING

1) dealing with someone who may challenge your authority
2) asserting your position in a non-threatening way
3) offering choices, exploring options to find a win-win solution

ACTING

1) closing a conversation
2) summarizing what you and the other person agreed upon
3) defining each person's responsibilities

You can apply the techniques in the communication model to the customer's basic needs.

* to feel welcome - you want their business and are happy they called.
* to be understood - you communicate effectively and interpret customer's messages correctly.
* to feel comfortable - you assure the customer that you will meet his needs.
* to feel important - ego, self-esteem

Before you encounter a customer on the phone you'll want to set general objectives for all calls, whether incoming or outgoing.

- business calls are a communication with a purpose, not just a conversation
- use a pleasant, animated tone of voice
- announce your name clearly
- remember the company image to be projected
- you, not the customer, control the transaction
- repeat customer's name and verify pronunciation and spelling, if appropriate

For every 100 calls placed by phone, there may be 20 or 30 additional calls about status, billing errors, returns, etc.

From *Practical Handbook of Distribution/ Customer Service* by Warren Blanding

HOW DOES BEING A GOOD COMMUNICATOR BENEFIT:

YOU	COMPANY	CUSTOMER

Session 2 - Active Listening

Materials Needed: Session 2 packets
Handout 4 (H)

Activity	Facilitator's Notes
Homework	Collect descriptions of frustrating communication situations if not completed during Session 1.
Handout 4 - Listening Survey	Have participants check a box for each statement, total and note 1 or 2 areas for improvement. Discuss, if appropriate with group.
Read Session 2, pages 1-3	Discuss listening, ask for questions, comments, and examples.
Read pages 4 & 5	Have participants read section on empathy and jot down responses to practice on p. 5. Discuss and share responses.
Role-play	Ask for volunteers to role-play practice situations using their responses. Ask for examples of when empathy worked on the job.

Activity	Facilitator's Notes
Read page 6 - Body language	Discuss additional body cues, ask for questions and experiences. Other examples of <u>open</u> body cues: nodding facial expression eye contact Examples of <u>closed</u> body cues: looking around the room folding your arms no facial expression
Read page 7 and 8	Discuss paraphrasing and responses to Practice A & B. Ask volunteers to role-play examples 1-3. Identify parts of responses i.e., rephrasing, emotions, etc. Ask for impressions of examples and find differences in examples 2 and 3.
Read pages 9 & 10. Role-play	After participants read dialogue on page 9, ask volunteers to role-play. Discuss answers to questions on pages 9 & 10 and role-play continuing conversation.
Read page 11	Ask for volunteers to read situations aloud and discuss more appropriate responses.
Closing	Preview next session "Discussing."

Activity	Facilitator's Notes
	Prior to Session 2-4, incorporate communications situations submitted by participants from homework.

HANDOUT 4

LISTENING SURVEY

How Good A Listener Are You?

What you say to yourself when someone is talking	Never	Now & Then	Fairly Often	Very Often
I'm upset or worried about other things.				
I'm thinking about what I'm going to say.				
I don't like you.				
I want to talk first.				
I'd rather daydream or doodle.				
I'd rather pay attention to people/ activities around me.				
I already know what you're going to say.				
That's too hard to understand!				
Total				

CUSTOMER SERVICE/ TELEPHONE COMMUNICATIONS

Session 2 - Active Listening

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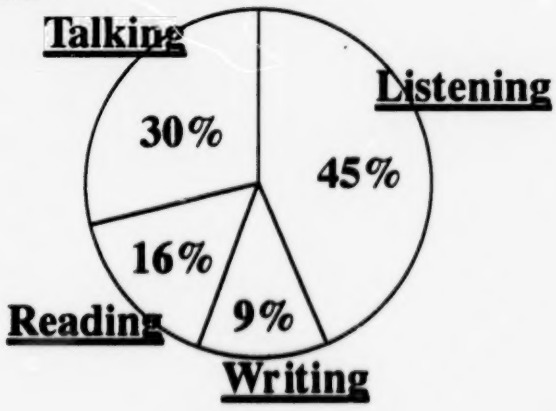
OBJECTIVE: To define and practice "active" listening techniques.

****

Ways we communicate



Sperry Corporation points out in a brochure, that of the four basic activities involved in communication, listening is learned first in the development of a child, used most in the course of one's life and is the least taught throughout all years of schooling.

"The ears have nothing comparable to eyelids, but they can be as effectively sealed as eyelids can be closed. Sometimes both close at the same time, but it is often the case that the ear is turned off while the eyes are open."

From *How To Speak, How To Listen* by Mortimer J. Adler

WE HEAR WHAT WE WANT TO HEAR

Reasons why people don't actively listen or have a "turned off" attitude.

- physical distractions, noises
- interrupting, if you think you know what the person is going to say
- lack of concentration, mind wandering
- busy planning a response, listening only to yourself
- more comfortable talking
- overreacting to certain words/phrases; these cause adverse emotional responses

People fail to understand about half of what they hear.

WHAT IS ACTIVE LISTENING?

Active listening is opening your mind as well as your ears. It is listening to respond to the customer's four basic needs:

The customer needs:	So you need:
to feel welcome	to show her you care
to be understood	to determine her problem quickly
to feel comfortable	to respond to her emotional needs
to feel important	to get her cooperation

In today's hurried pace of the workplace, we want to get to the problem right away and "take care of it," then move on to others. But if we don't let the other person know we really heard what they said and sympathize, they may not be satisfied and they may not cooperate in reaching a solution. It is so important to listen and pay attention, because what you hear is fleeting, unlike a written message that you can go back to later.

To be an active listener, you want to:

Concentrate - Keep alert for signs that your attention is wandering - looking out a window, thinking about lunch, etc.

Guard against becoming defensive - If you're speaking with someone you dislike, you may not listen. You may blame others at the company or want to defend co-workers. Monitor your own reactions.

Let people "vent" emotions - A customer wants her problems solved, but she needs to express her frustration first. Then she can move on to a solution. If you don't let her vent, even if you solve the problem, she may not feel satisfied because you didn't really "listen" to her. You need to recognize her feelings.

Don't assume or get in a hurry-hurry mood - You've heard the request, problem or inquiry many times before so you may be overanxious to take care of it. You may be so anxious that you miss the message. You're so sure you know what the person is going to say, you interrupt and finish the sentence yourself. Listen for new information.

EMPATHY

In order to understand a customer, you need to develop some type of rapport. The more closely you listen, the better you communicate and the more quickly you solve the problem. Responding empathetically, "You sound upset" and/or showing a willingness to help, "I'll be happy to help you with your order," is the first step to understanding. These responses show you care about the customer's situation. To effectively empathize, you need to do the following:

Imagine what it would be like to be in the customer's place.

In business, people are anxious because of time constraints, deadlines, work load, expectations of the boss/company, etc. Let them know you appreciate what they're going through. Your response helps them understand the effect of their message on you and allows you to get the real meaning of their message.

Recognize that anger sometimes hides fear and frustration.

People feel vulnerable because of those same work loads, deadlines, and expectations. They compensate for the fear and frustration by getting angry and passing it on to you. Identify the real problem, stick to it, offer to help and don't get caught up in the emotion.

Avoid taking criticism personally.

Accept and acknowledge a customer's feelings even though they may seem unreasonable. If you become defensive and debate or argue, communication breaks down and you are in a conflict. If you don't react defensively, if you "step back," the problem won't escalate. Don't pass judgment. Respond to the issues, not the individual. Instead of "You must be mistaken" use "I'm sorry you feel that way."

PRACTICE

Write 2 empathetic statements for the following situations.

A. University secretary (in agitated tone) - "The alumni director just handed me this note and told me to call and check on this right away and get back to him in 15 minutes. I'm new and I don't even know what this is about. He gave me a purchase order from your company and told me to check on it."

B. Ski shop employee - "Look, we're scheduled to open in a month and I was told we'd get our cap order in 2 weeks. I need those caps before then so I can have time to stock the shop."

ATTITUDE - BODY LANGUAGE/TONE OF VOICE

Body language or body cues are sometimes the most important part of communication. Open body language lets the other person know you're listening. Closed body language can make the other person feel rejected.

Think about the body cues you use.

Add other cues to the following list:

OPEN	CLOSED
Facing or leaning toward the speaker	Tapping a pencil
Smiling or showing appropriate emotion	Looking at papers, watch or clock
_____	_____
_____	_____
_____	_____

In telephone communication, you don't have the benefit of body language or appearance, you have only your voice to rely on. When you're on the phone, you are the single representative of the company. The customer cannot see you, so you need to make up for the lost non-verbal communication in your tone of voice. Be positive. Smile when you speak! A smile can be detected and is contagious! Your tone of voice or how you say something, is often more important than the words you use. Telephone feedback can also be in the form of verbal nods such as, "I understand" or "I see your point." Likewise, "mirroring" such as talking more slowly, more softly, or more quickly to reflect the caller's style, can be effective.

PARAPHRASING

Like empathizing, paraphrasing is an excellent way to build rapport with a customer. It also helps you get more information and check your understanding of the situation. A paraphrase can be a question or a statement.

- Rephrase or repeat what the person said to define the purpose of the call. This lets the other person know you understood them and shows your interest and willingness to help. If you rephrase correctly, the customer will confirm it. If you're wrong, she'll correct you.

- Make sure you identify the emotions of the speaker. How is she feeling? Recognize and acknowledge the intensity of the emotions and deal with them rather than ignore them.

- Use direct questions. After you've repeated what the customer has said and dealt with the emotions of the situation, you need to focus on the problem. Ask clear, direct questions (be empathetic, if appropriate) to get the information you need. Asking questions to clarify a situation can give you information or bring out hidden agendas or emotions.

EXAMPLES:

1. Customer: "I'm angry because I received an incorrect invoice."

   Employee: "You sound upset. What is incorrect on your invoice?"

2. Customer: "NO ONE at your company is listening to me."

   Employee: "You sound upset. Would you look at the invoice, please?"

3. Employee: (in response to the same statement from customer above) "You sound upset. It's frustrating when you feel that people aren't listening. Let me see what I can do to take care of this for you."

Other examples of paraphrase in response to various situations -

Inquiry - "You want to know . . ."

Problem - "In other words . . ."

Request - "You would like us to . . ."

Complaint - "As I understand it . . ."

What other examples can you use?

Write responses to practices A and B on page 5 that include paraphrase and a question.

A.

B.

PUTTING IT ALL TOGETHER - LISTENING PRACTICE

Read the following communication scenario between two company employees. Notice how the principles of active listening are used. Then answer the questions related to this situation.

Employee #1 - (bewildered) "I thought I knew what this customer wanted, but now I'm not sure I understand the instructions for the logo."

Employee #2 - "You sound confused. What is it that you don't understand?"

Employee #1 - "I get frustrated. I talked with the customer and he said he wanted a rainbow trout in the logo, but someone here said he wants a brown trout as part of the company logo."

Employee #2 - "I understand how you feel. I've had that happen to me too. It is upsetting when there are several interpretations of the art for a logo."

Employee #1 - "It sure is. I thought I had the idea and now I'm back to square one!"

Employee #2 - "Well what do you think you can do to clear up this situation? Is there something I can do to help?"

What emotion(s) is Employee # 1 feeling?

Write the key words Employee #1 says. (The words that prompt responses from Employee #2)

What would you do (say) differently?

What paraphrases/empathetic statements do you see?

Where would this conversation go if you were Employee #2?

DEFENSIVE REACTIONS

We know that listening, empathizing, and paraphrasing help us communicate effectively. On the other hand, responses which make excuses, become defensive or criticize another person, can be upsetting and make communication difficult, if not impossible.

How would you react differently in each of the following situations?

Criticizing

Customer - "Oh, I forgot to tell you, it's a different 'ship to' address."

Employee - "You should have told me that first."

Becoming Defensive

Customer - "Someone called me about my logo - the colors or something - and they didn't leave a name."

Employee - "It wasn't me. It must be someone in another department."

Passing the buck, making excuses

Customer - "Why is the tree on our logo light green instead of the dark green we ordered?"

Employee - " We are really busy now and everyone is in such a hurry to get the orders done and . . . "

Session 3 - Discussing

Materials Needed: Session 3 packets
Handout 5
Flipchart 4
Markers

Activity	Facilitator's Notes
Handout 5 - Communication Style Survey	Explain that there are 4 main styles of communication represented by these groups of statements. Ask participants to check all statements that apply to them. (They may have some in each group.)
Flipchart 4 - Communication Styles	Discuss/explain each style briefly. Group 1 is a people-oriented communicator, Group 2 is process-oriented, Group 3 is idea-oriented, and Group 4 is action-oriented. Explain that none is negative, we need to recognize and appreciate differences - work together in problem-solving.

Activity	Facilitator's Notes
Read Session 3 pgs. 1 - 3	Encourage participants to jot notes or questions as they read. Discuss and ask for responses to "I" statements.
Read pgs. 4 - 6	Discuss.
P. 7 Role-play in pairs or small groups	Give participants time to work together on responses, then ask each group to role-play the scenarios.
Read pgs. 8 - 10, write response on 10	Discuss customer service stats. Ask participants to share their experiences as a customer - good and bad. Did they tell others of their bad experiences? etc. Discuss responses to Scenario A on page 9.
Role-play practice pgs. 11 - 13 in pairs as small groups	Have participants work together on one of the 5 remaining scenarios (B-F). Ask each group to role-play response and discuss.
Closing	Preview final session - "Acting"

HANDOUT 5

What Is Your Communication Style?

Group 1

_____ 1. I would rather work with a team than on my own.
_____ 2. I hate rules and procedures that fail to consider people as individuals.
_____ 3. I let what other think affect my decision.
_____ 4. I try to put myself in "other people's shoes" whenever possible.
_____ 5. When I get angry, I try not to show it.

Group 2

_____ 1. I like to have a definite plan for doing things.
_____ 2. I like to carefully consider a situation to determine the correct solution the first time.
_____ 3. I would rather discuss a problem at length and consider all possibilities than make a decision with too little information.
_____ 4. I like to set goals so I know what my responsibilities are.
_____ 5. I can listen to a long discussion if it is focused on the topic at hand.

Group 3

_____ 1. I like to see the big picture and let someone else take care of the details.
_____ 2. I like to try new approaches instead of looking at things the same old way.
_____ 3. I like to research a subject on my own.
_____ 4. I really get charged up when I'm telling people my ideas.
_____ 5. I like to challenge authority.

Group 4

_____ 1. During business conversation, I prefer to "stick to the subject" and avoid small talk.
_____ 2. My mind tends to wander when I'm listening to something that doesn't interest me.
_____ 3. I prefer asking direct questions.
_____ 4. If I'm excited about something, it's easy to tell by my voice or gestures.
_____ 5. I like to accomplish tasks and quickly move on to others.

FLIPCHART 4

COMMUNICATION STYLES	
People - spontaneous - hate rules - feelings are important	Process - plan - set goals - patient/cautious
Idea - try new things - full of ideas	Action - direct - impatient - no small talk

CUSTOMER SERVICE/ TELEPHONE COMMUNICATIONS

Session 3 - Discussing

****

OBJECTIVE: To identify and practice discussion/problem-solving strategies including effective responses to criticism.

****

After you use "active" listening to determine a customer's need or problem, you will move to the discussion or problem-solving stage of the conversation. During discussion you:

1) clarify the problem by asking questions to determine how you can take care of the problem

2) maintain the customer's cooperation by being patient and offering choices (if appropriate)

By using the skills mentioned above, you develop a win-win solution and guide the conversation to a close. To have a successful discussion, you will want to use the following techniques.

USE YOUR KNOWLEDGE TO EXPLAIN

You understand many of the processes and procedures at work such as lead times, production schedules, etc. or you know where to go to get the information when you need it. Use this information to educate the customer so she knows what to expect. Remember to focus on the problem or situation, stick to the issues, look up facts or check with someone else. Make notes while you are discussing so you have accurate records of the conversation. Be patient in explaining, even if you need to repeat an explanation. Try different explanations if the customer doesn't understand and speak in language she understands - layman's terms - rather than company jargon. For example: refer to the "embroidery process" rather than "DE."

EXPLORE OPTIONS, OFFER CHOICES (IF APPROPRIATE)

Be willing to bend and if possible, offer options within company policy. If your customer has choices, she may be more flexible, more agreeable, and willing to compromise to reach a solution. This gives your customer some control or lets her share in the decision and gains her cooperation. Remember, that behind opposing positions there are shared, compatible interests and conflicting ones. (Example of shared interests - both customer and the company want good quality merchandise. Conflicting interests - the company's production schedule may not coincide with the customer's event date.)

BE POSITIVE

Instead of using language that accuses, criticizes or blames, use "I" language. "I" language focuses on the speaker and can imply that you are wrong, even if you aren't. People respond much more positively to "I" language than to "you" language. You can also use "we" to show that you are willing to work together toward a solution.

Instead of this:	Use "I" language
You don't understand!	I think we have different ideas about how this should be done.
You didn't listen to what I said.	I don't think I explained clearly.

CHANGE THE FOLLOWING TO "I" STATEMENTS:

A. (To a co-worker) "You did that all wrong!"

B. (To a customer) "You're not making yourself clear."

Avoid these negatives	Say it like this instead
"There's nothing I can do ..."	"Let me check to see what we can do."
"I'll try . . ."	"I will get back to you by ____."
"We don't . . ."	"We're sorry . . ."
"We can't . . ."	"We regret that . . ."
"You'll have to send us . . ."	"If you'd give me . . ." "If you'll send us . . ." "Would you please . . ."

Remember birds are entangled by their feet and men by their tongues.
Found in a fortune cookie

From *Are You Communicating* by Donald Walton

CREATE A WIN-WIN SITUATION

When someone is angry or upset about something, rather than communicating successfully, they may just want to prove they are right. Blaming or arguing will lead to a win-lose situation. By being patient, giving the other person choices, and using "I" language you create a win-win situation - you and the customer/co-worker each get part of what you want.

ASK THE RIGHT QUESTIONS

Initially in a conversation, you collect the information you need by asking open-ended questions that require more than a "yes" or "no" answer. This saves time and reduces the chance for error and misunderstanding. Open-ended questions begin with or include who, what, when, where, or why.

Example: Where should your order be sent?

What is the date of your tournament?

To confirm or verify information and understanding, use closed-ended questions which can be answered with "yes" or "no."

Example: You want your order sent to the Tacoma office?

Your tournament is scheduled for the 20th?

GUIDE/CONTROL A CONVERSATION

Some difficulties you encounter in a conversation are "chatty" customers and those who get side-tracked. Remember to confine your discussion to the agreed upon subject or get back to it by restating the key elements. Be courteous and patient. Don't be reluctant to engage in "small talk," but make it brief. Limit over-talkative customers without offending by empathizing and restating what will be done. Move the conversation along without saying, "Look, I don't have time for this." Say, "I appreciate your bringing this to our attention." Advise the customer of the next step to be taken, given information or instructions and make sure she understands.

Other things you might say to get the conversation back "on track":

"What can I do to help you with . . ."

"How can I assist you, Ms. _____?"

"I've enjoyed our conversation. I'll get your order processed today."

"I'll be sure to make those changes you requested."

GUIDE/CONTROL CONVERSATIONS

Scenario: Customer has called in to change a color on his logo.

Employee: "So you want the skis on your logo to be royal blue not teal?"

Customer: "Yes, I guess so. You know I hope we have enough snow to open by the 10th or we may not need the caps."

Employee: "I can understand your concern. Early snow can mean a lot to your business."

Customer: "It sure can. Then there's the problem of keeping employees. They find better jobs somewhere else or can't pay their rent and they're gone!"

Using the discussion techniques, how would you guide this conversation back to the subject?

Write your response below.

WHY CUSTOMERS COMPLAIN

- confused/overwhelmed
- feel ignored
- defending ego
- treated poorly in past
- waited a long time for service

According to the statistics compiled by the White House Office of Consumer Affairs, Technical Assistant Research Programs (TARP):

- 96% of unhappy customers *never complain*
- 91% of those who don't complain, *will not buy* again from the business that offended them
- the average unhappy customer will share the negative story with at least 9 other people
- 13% will tell more than 20 people
- the average unhappy customer will remember the incident for 23 1/2 years
- the average happy customer will talk about the pleasant experience for 18 months

From *The Essentials of Excellent Customer Service*, 1992. Skillpath, Inc.

CRITICISM/COMPLAINTS

The customer has the basic right to complain: We've discussed not becoming defensive when someone has a problem or complaint - the need to "step back" and deal with the situation not emotions. You have a choice. You can disagree or respond defensively and the customer will become angrier, or you can respond in a positive more professional manner and diffuse the other person's anger. Don't get into a tug-of-war or try to determine who is at fault. Avoid finger pointing. Empathizing will help you build rapport with the customer and help you find common ground.

The following are techniques you can use to respond to criticism.

Diffuse the situation

- Ask for specifics. Don't be intimidated by the customer's status. Get the facts and details that are necessary. Don't assume the customer's information is correct or that he stated the problem correctly. Restate or rephrase to insure understanding. Write down key promises or points to use for follow-up.

- Accept and acknowledge the customer's feelings. Empathize with the customer's emotions. Look for statements you can agree with or accept responsibility, as appropriate. You may not agree with an accusation, but you may agree with the principle behind it.

- Keep the customer. Do what you can to take care of the situation following company policies. Take immediate action when possible and negotiate, if appropriate. If you can't take immediate action, tell the customer what needs to be done and the time frame. Be diplomatic. Ask if there is anything else you can do or ask for other complaints. This may bring up other problems. Finally, thank the customer. Criticism is a form of quality control. Showing restraint, concern, and the ability to get things done is a positive example to the customer.

GROUP PRACTICE - RESPONDING TO CRITICISM

Diffuse situation - Ask for specifics
Look for statements you can agree with
Keep customer - action

Write your response to the following customer's critical statement using the techniques above.

Scenario A:

Customer: "Boy, are you guys off base. I just received a swatch and it's not at all what you described or what you said you were going to do."

Employee:

Scenario B: A customer calls to ask where her order is. Her event is tomorrow. The employee checks and sees that the ship date is in 2 weeks, but caps are ready. He calls shipping to get the order sent UPS so the customer will have the caps by tomorrow. Everyone is happy.

Next day, the customer calls again.

Customer: "I called yesterday about my order and the person I spoke with arranged to have them shipped here by today. I don't have them. You've ruined our event."

Employee:

(When he checks, the employee learns that the order was not shipped properly and the customer won't get the caps on time.)

Scenario C: This is Monday.

Customer: (in gruff voice) "My # is 1987604. Check when my order for 20 dozen caps will be ready."

Employee: "Just one moment and I'll get that for you. (Pause) We show a ship date of the 9th which is next Tuesday."

Customer: "Next Tuesday! We were supposed to have them tomorrow. Your records are wrong!"

Employee:

Scenario D:

Employee: "Ms. Vance, I'm calling about Invoice #230756 for $1,123.55 which was due in August."

Customer: "Can't you be patient? I don't know why you can't give us more time. We're having problems here."

Employee:

Scenario E: Employee initiates call to clarify order.

Employee: "I have a question about the thread colors on your ski lodge logo. We want to make sure we have the correct information."

Customer: "Just use the color on the hat band we sent."

Employee: "We don't have a hat band with this order."

Customer: "We sent one, I know we did. You must have lost it."

Employee: "When did you send it and was it sent to anyone's attention?"

As the conversation continues, the employee learns that another ski company employee has approved the logo colors although the customer on the line is in charge of the logo. Write how the conversation would progress.

Scenario F: A co-worker is critical of your work on a particular account. The logo design was different from what she thought the customer wanted.

Write how you would respond in this circumstance using the techniques for handling criticism.

Employee #1: "That isn't the way the customer wants that to look."

Employee #2:

Session 4 - Acting - Concluding a Conversation and Follow up

Materials Needed: Session 4 packets
Handout 6

Activity	Facilitator's Notes
Read Session 4 - pgs. 1 - 4	Discuss and ask for other suggestions for call backs, calendaring, follow up, etc.
Role-play practice p. 5	Ask for responses to Scenarios A & B and have volunteers role-play. Encourage participants to share their successful techniques.
Read pgs. 6 - 8	Discuss. Stress planning what to say before confronting someone - make notes so you don't forget the main points.
Role-play practice p. 9 in pairs or small groups	Participants work in pairs or small groups on each of the three confronting scenarios. Share responses by having each group role-play. Discuss.

Activity	Facilitator's Notes
Brainstorming	Ask participants to describe how they have used or will use the strategies from this workshop. What works? What doesn't? What will need the most practice?
Handout 6 - Post-assessment	Allow time for all to complete post-assessment.
Closing	Encourage use of these techniques, stressing that practice is necessary to improve skills.

HANDOUT 6

TELEPHONE AND INTERPERSONAL COMMUNICATIONS POST-ASSESSMENT

1. What are two differences between listening and "active" listening?

2. Write a paraphrasing statement you might use to let another person know you have understood what she said.

3. Rephrase the following into and "I" statement. "You're not listening."

4. Name a behavior that can prevent a "win-win" solution.

5. In a confrontation, why is the statement, "I'm not sure this order is written correctly" better than, "You aren't doing things right"?

CUSTOMER SERVICE/ TELEPHONE COMMUNICATIONS

Session 4 - Acting - Concluding a Conversation and Follow up

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OBJECTIVE: To identify and practice techniques to conclude a conversation, follow through on promised actions, and resolve conflict.

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CONCLUDING A CONVERSATION

You've listened to the customer and guided the conversation by asking questions to clarify the situation, offering choices, using positive statements - "I" language - and developed a win-win solution.

*Before the conversation is over, you'll want to restate or summarize what you and/or the customer agreed to do. You will confirm information, give instructions or tell the customer what happens next. This will prevent misunderstanding and offer reassurances about the timetable, prices, etc. Finally, thank the customer, if appropriate, and wait for him to hang up.

Example: The following is the conclusion of a collection call during which the customer agreed to make payment in two installments and the employee will send copies of the invoices to the customer.

Employee: "O.K. Mr. White, you'll be sending a check for $523.00 tomorrow, followed by a check for the balance of $556.00 on the 10th and I'll fax Invoice #23804 and #34862 to you today."

FOLLOW-UP

* Now you will follow through on actions you promised. Your credibility and the credibility of the company depend on it.

- Follow ups involve time management skills - organizing them in priority order. This can be done in a variety of ways:

  - Keep files in date order, including pertinent information such as contact person, telephone number, information needed, etc.

  - Note call backs or follow ups on a calendar or separate list by date.

  - Leave some room to add other items as they occur.

  - Once a week, go through you list or file to determine what is left to be done and note any missed or delayed follow ups.

  - Other ideas or suggestions?

If another department is involved, don't assume that your question or situation will be taken care of. Other departments have different priorities. Be diplomatic, but personally follow up with other departments.

CALL BACKS

If you agreed to call the customer back at a certain time, but you don't have the information he requested, call him back anyway and give him an update on the situation and arrange another call back when you will have the information.

- Plan your call so you can cover all points you need to discuss or get all the information you need from the customer in one call.

- Follow ups that mean a call back can lead to "telephone tag," when you don't reach the person to whom you need to speak. Sometimes, due to circumstances beyond you control, this can't be avoided. To minimize "telephone tag," try the following.

  1) If you call back and the customer is not in, find out when the person will call back or the best time for you to call (get the information from the secretary or receptionist who knows the schedule)

  2) If you call back and the customer doesn't have time to discuss the situation, respect that and reschedule a time to call.

  When you leave a message:

  3) Leave your name and telephone # (even if you think they have your #)

4) Give a time to return your call (If you're not available after 2 PM, tell them)

5) Leave as much information as possible regarding the purpose of the call

6) Let the person know if the call is urgent - mention dates, etc.

PRACTICE CONCLUDING A CONVERSATION

Scenario A: Customer service has taken an order from an established customer who mentioned a change in his logo after the ship date of 11/25 was given earlier in the conversation. (The customer needs to send art work before the process of changing the logo can begin.)

Scenario B: Mt. Hope Golf Club called with new artwork. You advised the customer you would forward it to the art department and call her back by 12/7 to discuss changes, etc. You sent the logo to the art department requesting it back by 12/5 so you could fax it to the customer on 12/6. Today is 12/6. What would you do to follow up on this?

CONFLICT/CONFRONTATION

Responding to Conflict

Despite our efforts to communicate effectively, conflicts arise. People respond to conflict in different ways. Some deal with it directly and talk to the person to resolve the situation, while others ignore it or accept it and say, "That's just the way he is." or "I've learned to live with it."

Following is conflict situation and possible responses.

Conflict: Co-worker repeatedly borrows supplies from your desk and does not return them. You've asked that he return what he borrows, but he hasn't.

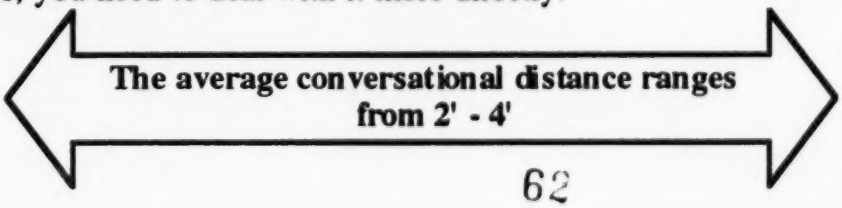
Possible Responses: You could ignore the problem.

You could scream and tell them never to do it again.

You could discuss the problem and work out a solution with the co-worker.

How do you usually respond to conflict?

Ignoring the problem or "letting it go" may be an appropriate response if it is a minor one. If it is more serious and frustrating to the point of affecting your performance at work, i.e., you're preoccupied or you're impatient with customers, you need to deal with it more directly.



CONFRONTING

Confronting is being assertive and acknowledging there is a problem and working with the other person to find a mutually satisfying solution. It is different from the other communication situations we've discussed because it involved people more familiar to us such as co-workers or family members. Confronting is not easy and it most often changes a relationship. You'll want to take some time to plan and consider the following:

- Ask yourself "What is the real problem?" Make sure you aren't blaming someone else for your problem.

- Don't overreact. Be honest. Do you want to improve the situation or just be right?

If you decide to confront, plan.

1) Arrange to discuss the problem privately.

2) Be specific. Rather than saying, "You aren't doing things right," state exactly what isn't right.

3) Describe the problem (behavior) using "I" language, "I am concerned . . ." The other person will be more receptive and less threatened.

4) Be flexible and open to change or suggestions from the other person.

There are different ways to approach a confrontation. One method for confrontation is:

- Describe the behavior that bothers you - identify the problem
- Explain the consequences - what happens as the result of the behavior
- Tell how it makes you feel

Example: (This is a response to the conflict on p. 5) "I have a problem when you take pens and paper from my desk. I come back to finish my work and I have nothing to work with. I bet you can imagine how frustrated I get?"

PRACTICE

Scenario A: A co-worker has done the same process wrong 3 times today. You've been waiting half the day for his paperwork before you can proceed.

What would you say to confront this problem?

Scenario B: A company sales rep. called to see how a customer is treating you. You tell him that you have a good relationship with the customer, but because the rep has had problems with the customer, he calls his supervisor to complain about him. You find out that the sales rep included you in the complaint.

What will you say to the sales rep?

Scenario C: During a very busy time, a co-worker interrupts you with several problems, all of which are "rushes" or "priorities," and then doesn't have the details you need to take care of the situation.